

# CIVIL SERVICE/CSU MEMBERSHIP

## TABLE OF CONTENTS

<u>Determining Membership Eligibility</u> .....	143
<u>Positions Excluded by Retirement Law (PERL) from CalPERS Coverage</u> .....	144
<i>Exclusions from Membership — General</i> .....	144
<i>Members of Other Retirement Systems</i> .....	144
<i>Health and Welfare or Trade Rate Employment</i> .....	144
<i>Independent Contractors</i> .....	144
<i>Elected or Appointed Officers</i> .....	144
<i>Student Aides in the Special Schools of the State Department of Education</i> .....	144
<i>California Conservation Corps Participants</i> .....	144
<i>Assembly Fellows, Senate Fellows, and Executive Fellows</i> .....	144
<i>Inmates of State Institutions</i> .....	144
<i>Exclusions Applicable Only to California State University</i> .....	145
<i>Student Assistants</i> .....	145
<i>Extension Service</i> .....	145
<i>Summer Session/Intersession</i> .....	145
<i>Exclusions Applicable Only to University of California</i> .....	145
<i>Employees Hired after October 1, 1963</i> .....	145
<i>Extension Service</i> .....	145
<i>Summer Session/Intersession</i> .....	145
<u>“Optional” Members of CalPERS</u> .....	146
<i>“Optional” Members</i> .....	146
<i>General Provisions/Instructions</i> .....	146
<i>Past “Optional” Membership Service Credit</i> .....	147
<u>Election of Optional Membership (AESD-3, AESD-59, or AESD-83)</u> .....	148
<i>Purpose</i> .....	148
<i>When to Complete</i> .....	148
<i>Other General Provisions and Instructions</i> .....	148
<u>CalPERS Membership Eligibility</u> .....	149
<i>Failure to Timely Enroll a Member</i> .....	150
<i>Notice of Exclusion from CalPERS Membership</i> .....	150
<u>First-Tier vs. Second-Tier</u> .....	151
<u>CalPERS or CalSTRS?</u> .....	153
<i>Differences between CalPERS and CalSTRS</i> .....	155
<i>Additional Information</i> .....	155
<u>Overtime Positions</u> .....	157
<u>Birth Date Discrepancy PERS-MEM-12</u> .....	158
<i>Purpose</i> .....	158
<i>When to Complete</i> .....	158
<i>Instructions</i> .....	158
<i>Acceptable Documents</i> .....	158

*Civil Service/CSU Membership Contents*

<b><u>Notice of Change PERS-MEM-155 (CalPERS-Initiated Form)</u></b>	<b>159</b>
Purpose .....	159
Special Instructions .....	159
<b><u>Reciprocity and Similar Benefits</u></b>	<b>161</b>
Full Reciprocity .....	161
Public Retirement Systems That Have Established Reciprocity With CalPERS.....	161
<b><u>Reciprocity Requirements</u></b>	<b>162</b>
Conditions for Acquiring the Benefits of Full Reciprocity .....	162
Important Restrictions.....	162
<b><u>Rights and Benefits with Full Reciprocity</u></b>	<b>163</b>
<b><u>CalPERS Benefits for Non-Qualifying Individuals</u></b>	<b>164</b>
<b><u>CalPERS Benefits Arising from Movement to Reciprocal and Certain Non-Reciprocal Public Retirement Systems</u></b>	<b>165</b>
Final Compensation .....	165
Redeposit Rights .....	165
Refund Restriction.....	165
Vesting .....	165
Disability Retirement.....	165
<b><u>How to Notify CalPERS when the Member Changes Retirement Systems</u></b>	<b>166</b>
JRS, JRS II, and LRS Members .....	166
Long-Term Care Program Members .....	166
<b><u>Service Credit Purchase Options</u></b>	<b>167</b>
Redeposits .....	167
Service Prior to Membership .....	167
Verification of Service Prior to Membership.....	167
Public Service and Leaves of Absence .....	167
<u>Present Value Service Credit Purchases</u> .....	168
<u>Additional Retirement Service Credit</u> .....	168
<u>Peace Corps, Americorps Vista, and Americorps</u> .....	168
<u>Credit for Military Service Prior to Employment</u> .....	168
<u>Credit for Absence from Employment for Military Service</u> .....	168
<u>Contract Exclusions</u> .....	169
<u>Payment Methods</u> .....	169
<u>Inquiries</u> .....	170
<u>Cost Estimate</u> .....	170
<b><u>Authorization for Contribution and/or Rate Adjustment PERS-MEM-823A (CalPERS-Initiated Form)</u></b>	<b>171</b>
Purpose .....	171
Special Instructions .....	171
<b><u>Authorization for Contribution and/or Rate Adjustment PERS-MEM-823A</u></b>	<b>172</b>
<b><u>Information about PERS-MEM-823A</u></b>	<b>173</b>
<b><u>Refund of Member Contributions</u></b>	<b>174</b>
Member Refund: Online Notification via the PIMS System.....	174
Member Refund: Notification on AESD-1 or Online Via ACES.....	174